

Original Application for Ad Valorem Tax Exemption for Charlotte County

Application Id: _____ Type: _____ Tax Year: _____ Property Identification Number: _____

Owner: _____

Mailing Address: _____

City: _____ State: _____ Zip: _____

Property Address: _____

Legal Description: _____

- Exemption Type**
- Homestead Exemption up to \$50,000
 - 65 and older with limited income (amount by ordinance)
 - \$500 Widow \$500 Widower \$500 Blind
 - \$500 Disability \$5,000 Disabled veteran
 - Total and permanent disability - Quadriplegic
 - Service connected total and permanent disability
 - Disabled veteran confined to a wheelchair
 - Disabled veteran discount (65 or older)
 - Surviving spouse of veteran who died while on active duty
 - Surviving spouse of first responder who died in line of duty
 - Total and permanent disability

Note: Disclosure of your social security number is mandatory. It is required by section 196.011(1)(b), Florida Statutes. The social security number will be used to verify taxpayer identity and homestead exemption information submitted to property appraisers.

Did you file tax exemption last year? Yes No

Address last year: _____

Ownership Information

Percent of ownership: _____ Type of deed: _____

Recorded: Book: _____ Page: _____

Date recorded: _____ Date of deed: _____

Permanent Florida residency required as of January 1

Proof of residence for all applicants	Owner	Co-owner	Other Owner
Name			
Do you claim residence in another county or state?			
Date last became a permanent resident of Florida			
Date of occupancy			
Florida drivers license number			
Date license issued			
Florida vehicle tag number			
Florida voter reg no (US citizen)			
Date registered as voter			
Date of birth			
Social Security Number			
Marital Status			
Husband, Wife, Other			
Spouses death date if applicable			
Immigration No (non-US citizen)			
Date alien card granted			
Declaration of Domicile Res date			
Current employer			
Address listed on last IRS return			

NOTE: I hereby authorize this agency to obtain information necessary to determine my eligibility for the exemption(s) applied for. If all information is not received by March 1st, your application will be processed for whatever exemption you qualify for on that date.

I hereby make application for the exemption(s) indicated and affirm that I do qualify under Florida Statutes. I am a permanent resident of the State of Florida and I own and occupy the property above. I understand that section 196.131 (2), Florida Statutes provide that any person who knowingly and willfully gives false information for the purpose of claiming homestead exemption is guilty of a misdemeanor of the first degree, punishable by a term of imprisonment up to 1 year or a fine up to \$5,000 or both. Further, under penalties of perjury, I declare that I have read the foregoing application and the facts in it are true.

IN ADDITION, I HEREBY CERTIFY THAT I DO NOT HOLD, NOR AM I SEEKING, A PROPERTY TAX RELATED EXEMPTION IN ANOTHER STATE.

Owner Signature _____ Co-Owner Signature _____ Other Owner Signature _____

Date: _____

This application must be filed with the property appraiser on or before March 1

Under section 196.031, Florida Statutes, a person who receives or claims the benefit of a residency based exemption, tax credit, rebate, or rollback in another state is not entitled to the homestead exemption.

A person, who rents all or nearly all of his homesteaded residence for more than 30 days per calendar year for two (2) consecutive years, is considered to have abandoned the residence as a homestead. This does not apply to members of the U.S. Armed Forces (see section 196.061, F.S.).

Under Article VII, section 6(b), Florida Constitution, married persons are entitled to one homestead exemption as a family unit. A married couple is considered a family unit unless they can prove otherwise to the property appraiser.

I hereby certify and acknowledge as a single person or a married family unit. I have read the foregoing application and the facts in it are true.

Owner Signature	Co-Owner Signature	Other Owner Signature
Date: _____	Home Phone: _____ Deputy: _____	Location: _____
	Work Phone: _____	

Penalties

The property appraiser has a duty to put a tax lien on your property if you received a homestead exemption during the past 10 years that you were not entitled to. The property appraiser will notify you that taxes with penalties and interest are due. You will have 30 days to pay before a lien is recorded. If this was not an error by the property appraiser, you will be subject to a penalty of 50 percent of the unpaid taxes and 15 percent interest each year (see section 196.011(9) (a), F.S). For special requirements for estates probated or administered outside Florida, see section 196.161(1), F.S.

The information in this application will be given to the Department of Revenue. Under s. 196.121, F.S., the Department and property appraisers can give this information to any state where the applicant has resided. Social security numbers will remain confidential under s.193.114(5), F.S.

EXEMPTION AND DISCOUNT REQUIREMENTS

Homestead Every person who owns and resides on real property in Florida on January 1, makes the property his or her permanent residence, and files an application, may receive a property tax exemption up to \$50,000. The first \$25,000 applies to all property taxes. The added \$25,000 applies to assessed value over \$50,000 and only to non-school taxes.

Your local property appraiser will determine whether you are eligible. The appraiser may consider information such as the items requested on page 1.

Save our Homes (SOH) Beginning the year after you receive homestead exemption, the assessment on your home cannot increase by more than the lesser of the change in the Consumer Price Index or 3% each year, no matter how much the just value increases. If you have moved from one Florida homestead to another within the last two years, you may be eligible to take some of your SOH savings with you. See your property appraiser for more information.

This page does not contain all the requirements that determine your eligibility for an exemption.

Consult your local property appraiser and Chapter 196, Florida Statutes, for details.

Added Benefits Available for Qualified Homestead Properties				
	Amount	Qualifications	Forms and Documents*	Statute
Exemptions				
Local option, age 65 and older	Determined by local ordinance	Local ordinance, limited income	Proof of age DR-501SC, household income	196.075
	The amount of the assessed value	Local ordinance, just value under \$250,000, permanent residency for 25 years or more.	DR-501SC, household income	
Widowed	\$500		Death certificate of spouse	196.202
Blind	\$500		Florida physician, DVA*, or SSA**	196.202
Totally and Permanently Disabled	\$500	Disabled	Florida physician, DVA*, or SSA**	196.202
	All taxes	Quadriplegic	2 Florida physicians or DVA*	196.101
	All taxes	Hemiplegic, paraplegic, wheelchair required for mobility, or legally blind Limited income	DR-416, DR-416B, or Letters from 2 FL physicians (For the legally blind, one can be an optometrist.) Letter from DVA*, and DR-501A, household income	196.101
Veteran's and First Responders Exemptions and Discount				
Disabled veteran discount, age 65 and older	% of disability	Combat-related disability	Proof of age, DR-501DV Proof of disability, DVA*, or US government	196.082
Veteran, disabled 10% or more by misfortune or during wartime service	Up to \$5,000	Veteran or surviving spouse of at least 5 years	Proof of disability, DVA*, or US government	196.24
Veteran confined to wheelchair, service-connected, totally disabled	All taxes	Veteran or surviving spouse	Proof of disability, DVA*, or US government	196.091
Service-connected, totally and permanently disabled veteran or surviving spouse	All taxes	Veteran or surviving spouse	Proof of disability, DVA*, or US government	196.081
Surviving spouse of veteran who died while on active duty	All taxes	Surviving spouse	Letter attesting to the veteran's death while on active duty	196.081
Surviving spouse of first responder who died in the line of duty	All taxes	Surviving spouse	Letter attesting to the first responder's death in the line of duty	196.081
Department of Revenue (DR) forms are available at http://dor.myflorida.com/dor/property/forms/ *DVA is the US Department of Veterans Affairs or its predecessor.**SSA is the Social Security Administration.				